



National Institutes of Health/Office of Extramural Research



Electronic
Research
Administration



Interagency Edison (iEdison II) Release Notes

Version 2.0.1.0 June 6, 2003

General Overview

The Interagency Edison (iEdison II) System has the following enhancements:

- New look and feel. The new iEdison site is more compact, requiring less navigation to access similar types of information as those found in the original version.
- The relationship between patent and invention reports is represented in a functional graphic.
- The 7 digit Organization Code is no longer required for logging in to the system.
- Login attributes—your name, iEdison role, and institution—are displayed in a Welcome message at the top of each screen.
- A completely re-designed help system is available, with page-level help.
- The Audit Trail capability has been enhanced.
- The names, Email addresses, and phone numbers of Bayh-Dole administration officers is available from the home page.
- The Invention Disclosure, Confirmatory License, and Government Support Clause may now be submitted electronically instead of by mail and fax.
- Enhancements for viewing notification messages have been added.
- There are new Email notifications.
- There are enhanced Administrator Functions.

The New iEdison Home Page

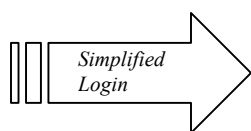


Figure 1 - The New iEdison Home Page

The new iEdison has a sleek, new design offering easy access to all of the commonly used areas. All of the information offered on the iEdison I home page can be easily accessed on the iEdison II home page.

Logging in to the system no longer requires the organization code, only your username and password.

A message area has also been included on the home page to inform you of any scheduled outages or other important notifications.

Instructions for Organizations with Large Databases

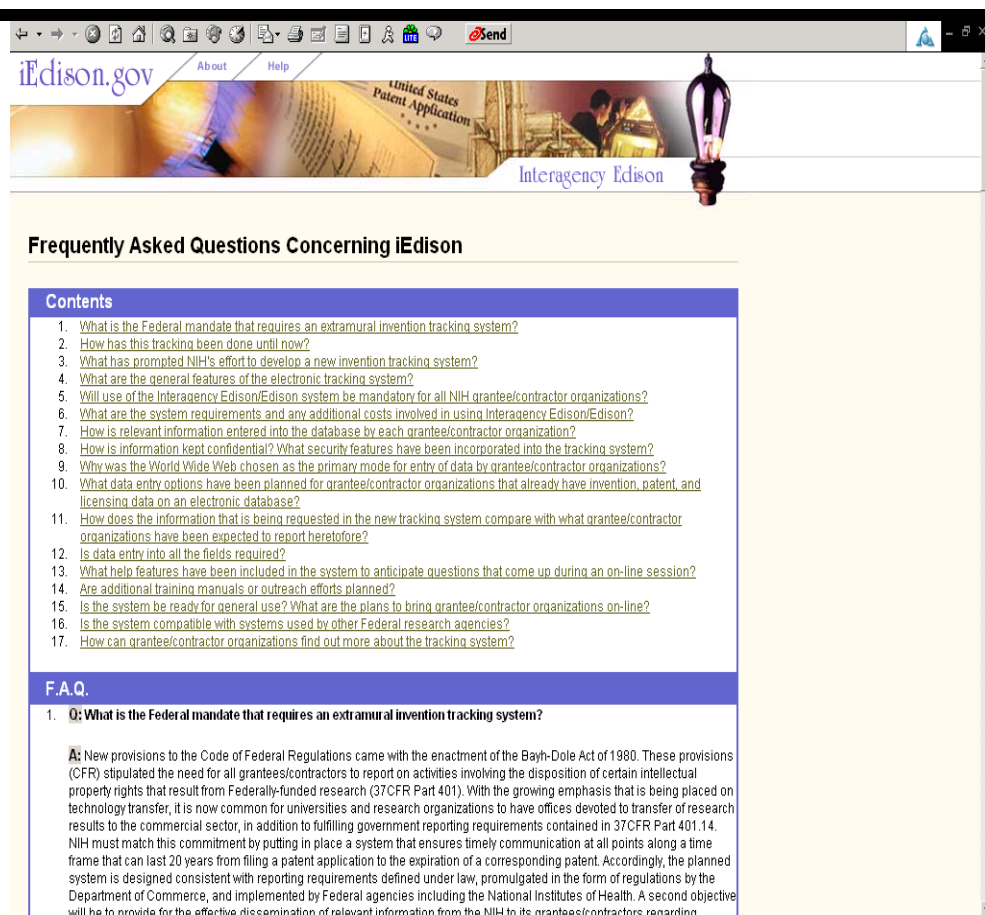


Figure 2 - Special Instructions for Organizations with Large Databases (Frequently Asked Questions Page)

"Special Instructions for Organizations that have Large Databases" no longer appears on the home page; it may be accessed by clicking the FAQ link from the home page. Question 10 contains a link to Help Text detailing the specific instructions.

This information may also be accessed by clicking the Help Links directly.

Help System

Newly Designed Help System

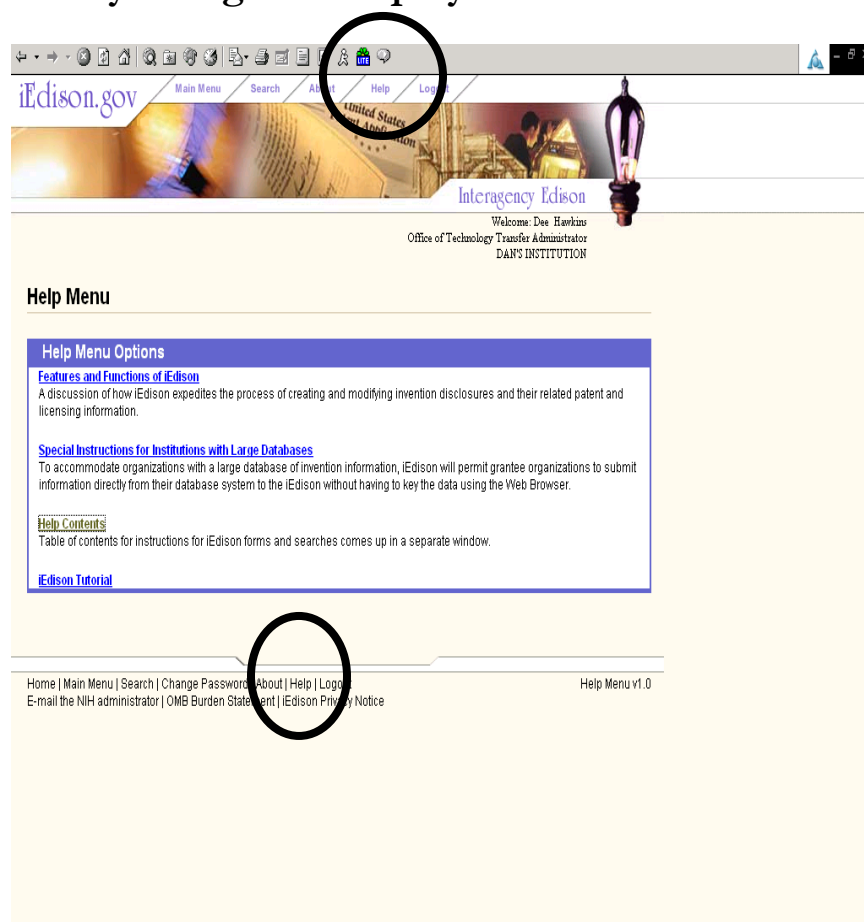


Figure 3 - New Help System Menu

In the new iEdison, help is never very far away. Help links appear at the top and bottom of every screen in the iEdison site. Clicking on these links produces the Help Menu giving you access to Features and Functions, Special Instructions, Help Contents and an iEdison Tutorial. The Help Contents link displays a list of the iEdison features with explanatory text and examples.



Figure 4 - Login Title Bar

Help can also be obtained by clicking the “?” icon located on title bars throughout the site.

Invention Reports Search Results

The screenshot shows the iEdison.gov web application. On the left, a tree structure under 'Invention Overview' lists several reports, including 'OTT One Test Child Patent - title modified' and 'OTT Two Test Child Patent'. A black oval highlights this tree. On the right, the 'Modify Invention Report' form is displayed, containing fields for 'Invention Report Number', 'Grantee/Contractor Organization Name', 'Grantee/Contractor Organization Code', 'Research Tools Guidelines Agreement Accepted Date', 'Invention Docket Number', 'Invention Title', 'Invention Keyword(s)', 'Inventor' (with first, middle, and last name fields), and 'Invention Report Date'.

Figure 5 - Modify Invention Report Form

Invention Report Search results are now displayed in an easy-to-use tree structure. This format shows the Invention Report along with all of the related documents. From the display screen, you may select to view or edit any related patents and inventions.

To access this view –

1. From the main menu, select Search/Modify Existing Invention Reports
2. On the Search page, enter the search criteria and submit
3. On the results page, select Modify Invention Report

Granting “View Only” access to Invention Reports

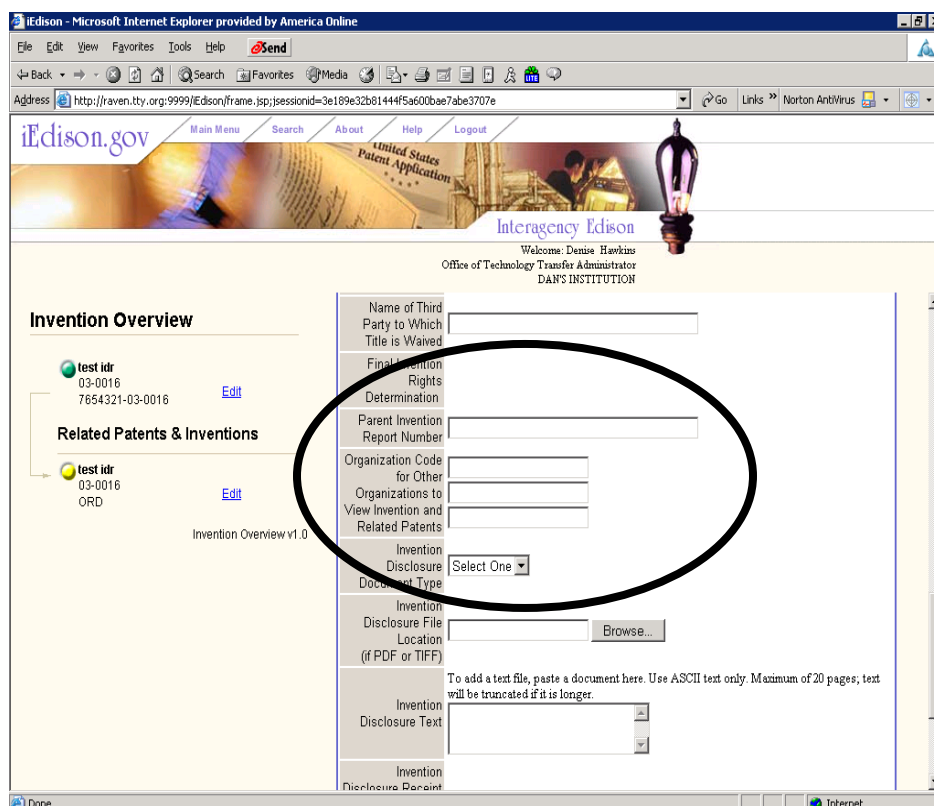


Figure 6 - Modify Invention Report Form - Granting "View Only" access

To grant “view only” access to another organization -

On the Modify Invention Report form (shown in figure 6), enter the organization code for the organizations to which you are granting access. Those organization codes should be entered in the “Organization Code for other Organizations to view Invention and Related Patents” field.

NOTE: You may grant access to a maximum of three organizations.

You may also link Invention Reports by designating a “Parent” or main Invention Report. To link reports –

1. Search for and select the parent invention report.
2. Record the Invention Report Number.
3. Search for a select the report that you would like to link to the main report.
4. Enter and submit the parent report number into the “Parent Invention Report Number” field. (As shown in figure 6).

Electronic Submission of Invention Disclosure

The screenshot shows the 'iEdison.gov' website interface. The main content area is titled 'Invention Overview'. On the left, there is a list of 'Related Patents & Inventions' including 'OTT One Test Child Patent' and 'OTT Two Test Child Patent'. On the right, there is a form titled 'Modify Invention Report Form'. A black circle highlights the 'Invention Disclosure Document Type' dropdown menu, which is open and shows options: PDF, Paper, TIFF, and Text. The 'Invention Disclosure File Location' field is also visible, with a 'Browse...' button next to it. The form includes fields for 'Parent Invention Report Number', 'Organization Code', 'Invention Disclosure Text', 'Invention Disclosure Receipt Date', and 'Last Modified Date'.

Figure 7 – Modify Invention Report Form

Extramural Users may now electronically submit and view the invention disclosure document. Documents can be submitted in four different formats:

- ❑ PDF – Portable Document Format
- ❑ Paper – Fax or mail
- ❑ TIFF - Tagged Image File Format
- ❑ Text – Paste ASCII text in the Invention Disclosure Text field

On-line submission of a PDF, TIFF or Text file eliminates the need to fax or mail a paper copy.

To submit an electronic PDF or TIFF version –

1. Select the document format as show in figure 7.
2. Click the “Browse” button next to the Invention Disclosure File Location field.
3. Select the document and click the submit button.
4. The file will be uploaded and a “View Document” link will appear. To view the document, click this link.
5. To submit a new version, follow the steps above.

Submitting a Text Version

To submit a Text version of the Invention Disclosure document –

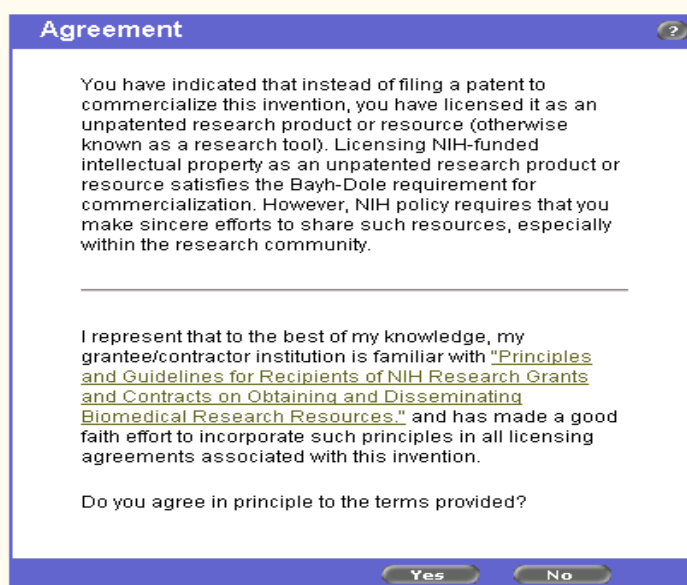
1. Select “Text” for the Invention Disclosure Document type.
2. Cut and Paste ASCII text into the “Invention Disclosure Text” field.
3. Select the document and click the submit button.
4. The file will be uploaded and a “View Document” link will appear. To view the document, click this link.
5. To submit a new version, follow the steps above.

NOTE: There is a maximum of 20 pages of text. Anything longer than 20 pages will be truncated.

Research Tools Guidelines Agreement

Research Tools Guidelines Agreement

The Research Tools Guidelines Agreement required for an invention that will generate no patents has NOT been previously agreed to. Please review the information below and indicate your agreement.



The screenshot shows a web form titled "Agreement" with a question mark icon in the top right corner. The form contains the following text:

You have indicated that instead of filing a patent to commercialize this invention, you have licensed it as an unpatented research product or resource (otherwise known as a research tool). Licensing NIH-funded intellectual property as an unpatented research product or resource satisfies the Bayh-Dole requirement for commercialization. However, NIH policy requires that you make sincere efforts to share such resources, especially within the research community.

I represent that to the best of my knowledge, my grantee/contractor institution is familiar with "[Principles and Guidelines for Recipients of NIH Research Grants and Contracts on Obtaining and Disseminating Biomedical Research Resources](#)," and has made a good faith effort to incorporate such principles in all licensing agreements associated with this invention.

Do you agree in principle to the terms provided?

At the bottom of the form are two buttons: "Yes" and "No".

Figure 8 - Research Tools Guidelines Agreement

The research tools guidelines agreement may now be reviewed and accepted online. When submitting an invention disclosure report that is licensed as an unpatented biological material or research tool, the acceptance terms of a Research Tools Guidelines Agreement will automatically be displayed prior to submission of the report.

Adding a Patent Report

Create New Patent Report

All fields marked with an asterisk (*) are required. Fill out the fields below and then choose "Submit" to save your changes.
 Note: The following information should apply only to a single patent filing in relation to invention report number 7654321-02-0015.

Patent Report Form

Invention Report Number	7654321-02-0015		
Grantee/Contractor Organization	DAN'S INSTITUTION (7654321)		
Patent Docket Number	01-002		
* Type of Patent Application	ORD/UTIL		
* U.S. Patent Title	Testing Patents		
Invention Keyword(s)	Zeta Alpha		
	Add / Edit Keywords		
* Inventor(s)	* First Name	Middle Name	* Last Name
	Virginia	M.	Cable
	Add / Edit Inventors		
Provisional Patent Application Number	(60 or 61 or 62/###,###)		
Filing Date of Provisional Patent Application [required if Provisional Application number supplied]	(mm/dd/yyyy - cannot be before June 8, 1995)		
Non-Provisional Patent Application Number			
Filing Date of the Non-Provisional Patent Application [required if Non-Provisional Application number supplied]			
PCT Patent Application Number	(PCT/AA#####)		
Filing Date of PCT Patent Application [required if PCT number supplied]	(mm/dd/yyyy)		
Patent Number			
Patent Issue Date [required if Patent number supplied]			
Patent Expiration Date			

Figure 9 - Patent Report Form

In the previous version of the iEdison system, patent filings could only be added for Invention reports with a status of Elect Title. In the new version, you may now add a patent filing to an invention disclosure that has a status equal to "Under Evaluation" or "BARRED" as well.

To add a patent filing to a previously submitted Invention Report -

1. From the main menu, select "Create Patent Filing"
2. Enter in the search criteria for the Invention Report to which the Patent Report should be associated.
3. On the search results page, select "Add Patent Report"
4. Enter and submit the patent report information on the Patent Report form as shown in figure 9.

Patent Report Enhancements

The screenshot shows the 'iEdison.gov' website interface. The main content area is titled 'Invention Overview'. On the left, there is a list of 'Related Patents & Inventions' with entries like 'Telephone 00-0013 7654321-00-0013' and 'Telephone 00-0015 ORD'. The right side of the form contains various input fields. A large black oval is drawn around the 'Parent Patent' section, which includes fields for 'Parent Patent Docket Number' (containing '7654321'), 'Parent Patent Organization Code', and 'Enter Invention Report Numbers'. Below this, there are fields for 'Other Related Inventions', 'Organization Code for Other Organizations to View This Patent', and a 'Support Document Type' dropdown menu.

Figure 10 – Modify Patent Report Form – Linking Patent Reports

You may now link patent reports and grant other organizations “view-only” access to your reports. Once patent reports are linked, the patent will appear in the invention overview under the Related Patents and Inventions heading.

To link patents –

1. From the Main menu, select Search for Existing Patent Report (Follow the steps in the “Adding a Patent Report” section above to create a new patent report)
2. Enter the search criteria for the parent invention report.
3. Select the “Edit” link for the patent report you would like to amend to display the Modify Patent Report form.
4. Enter the Docket Number and Organization Code associated with the parent patent into the “Parent Patent Docket Number” and “Parent Patent Organization Code” fields.
5. Complete step 4 for each patent that you wish to designate as a child to the Parent Patent.

An example appears on the following pages.

Figure 10 shows the Invention Report for the invention of the telephone. The tree diagram shows that there are three patents associated with this invention. For the purposes of this example, patent #00-0015 is the parent patent.

1. Click edit on the parent patent record.
2. Record the Docket Number and Organization Code.

Linking Patent Reports Example

Grantee/Contractor Organization: DAN'S INSTITUTION (7654321)

Patent Docket Number: 00-0015

Figure 11 - Patent Docket Number and Organization Code

3. Click edit on the patent that you would like to designate as a child. In this case I selected #00-0013.
4. Enter the Docket Number and Organization Code for the Parent Patent.
5. Click submit to display the view only confirmation page.

7654321-00-0013

Related Patents & Inventions

- Telephone 00-0013 ORD [Edit](#)
- Telephone 00-0015 ORD [Edit](#)

Requested Rights assigned to Other Party: []

Parent Patent Docket Number: 00-0015

Parent Patent Organization Code: 7654321

Enter Invention Report Numbers: []

Other Related Inventions: []

Figure 12 - Entering Parent Patent Information

6. Click submit on the confirmation page to display the Patent Report Modification Confirmation page.

Invention Overview

Telephone 00-0013 7654321-00-0013 [Edit](#)

Related Patents & Inventions

- Telephone 00-0013 ORD [Edit](#)
- Telephone 00-0015 ORD [Edit](#)
- Telephone 00-00131 ORD [Edit](#)

Modify Patent Report

Patent Report Modification Confirmation

The modifications made to patent report 00-0013 have been saved to the database. Below you may choose to print a copy of the U.S. government confirmatory license that must be signed and submitted to the awarding federal agency. An electronic version of the signed license (as PDF or TIFF) may be submitted as part of the "Modify Patent Report" interface.

Modify another [patent filing](#).

If you would like to print out a Confirmatory License for this patent, select the "Print License" button below:

[Print License](#)

Home | Main Menu | Search | Change Password | Modify Patent Report v1.0 | About | Help | Logout

Figure 13 - Patent Report Modification Confirmation

Patent Docket Number 00-0015 has now been designated as the Parent Patent for Patent Docket Number 00-0013.

NOTE: You may link a maximum of four patents.

Granting “View Only” Access to Patent Reports

To grant “view-only” access to another organization -

On the Modify Patent Report form (shown in figure 10), enter the organization code for the organizations to which you are granting access. Those organization codes should be entered in the “Organization Code for other Organizations to view this Patent” field.

Only the organization that submitted the parent invention disclosure has permission to edit the linked patent documents.

NOTE: You may grant access to a maximum of three organizations.

Electronic Submission of Patent Report Documents

The screenshot shows a web form titled "Modify Patent Report Form". It contains several sections for document submission:

- Government Support Clause Document Type:** A dropdown menu with "Select One" selected.
- Government Support Clause File Location (if PDF or TIFF):** A text input field followed by a "Browse..." button.
- Government Support Clause Receipt Date:** A text input field.
- Confirmatory License Document Type:** A dropdown menu with "Select One" selected.
- Confirmatory License File Location (if PDF or TIFF):** A text input field followed by a "Browse..." button.
- Confirmatory License Receipt Date:** A text input field.
- Last Modified Date:** Displays "03/27/2003 14:24".
- Buttons:** "Submit" and "Cancel" buttons at the bottom.

Figure 14 - Electronic Submission of Patent Report Documents (Modify Patent Report Form)

The Confirmatory License and Government Support Clause can now be submitted electronically. To submit an electronic version of these documents-

1. From the Modify Patent Report Form, select the Document Type. Acceptable formats are Paper, PDF or TIFF.
2. For PDF or TIFF formats, click the “Browse” button next to the File Location field.
3. Select the document and click the submit button.
4. The file will be uploaded and a “View Document” link will appear. To view the document, click this link.
5. To submit a new version, follow the steps above. The new version will replace the old version in the system. The receipt date and time will be automatically updated to reflect the new submission.

Paper versions may be submitted via fax or mail. You do not need to submit a paper version if you submit electronically.

Notification Messages

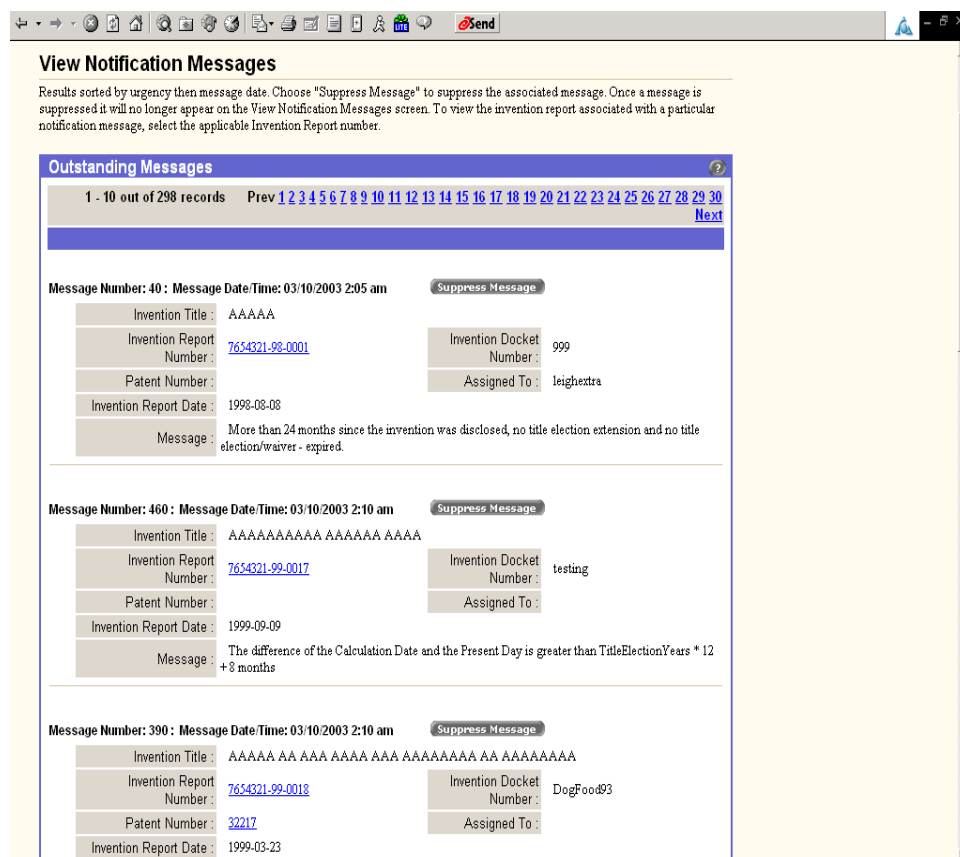


Figure 15 – View Notification Messages Page

Notification messages for each user may now be suppressed so that only messages related to specific invention or patent records are displayed. All notification messages for an organization will still be displayed for administrators.

To suppress messages –

1. From the Main Menu, select View Notification Messages.
2. A list of unsuppressed notification messages generated for inventions will be displayed, with the option to view/modify the actual invention report or the associated patent prior to action.
3. To suppress messages for the selected report, click "Suppress Messages"

NOTE: You may also view or modify the invention report or patent from the Notification Messages page by clicking the highlighted invention report number or patent number.

Email Notifications

Many new Email notifications were added to the iEdison system to ensure proper notification of all changes to your submissions. They are presented alphabetically with a brief description.

Account Type Changed Email

If an account administrator changes a user's account, either from an administrator to a regular user, or from one type of user within the federal system to another type, an Email message is sent automatically to the person whose account was changed.

Email Address Verification

An Email message is generated automatically by the system and sent to the Office of Technology Transfer (OTT) administrator or the Inventor, who registers a new iEdison organization, to validate the Email address entered on the registration request form.

Approval Email

When the iEdison Accounts Administrator approves a registration request, an Email message is sent automatically to the OTT administrator or the Inventor who submitted the request. That message includes the username for the account.

Create Account Email

When an administrator creates an account, an Email message containing the username, password, and permissions information is sent automatically to the person whose account has been created.

Deleted Account Email

When an account is deleted, an Email message is automatically sent to the account owner.

Email Address Changed

When you change your Email address, or when an administrator changes it for you, an Email message with the new Email address is sent automatically to the old Email address.

iEdison Accounts Administrator Message Email

The National Institutes of Health (NIH) iEdison Account Administrator Message Email is generated by the system to the NIH iEdison Account Administrator when a user sends a message.

Information Request Email

The iEdison Accounts Administrator may send Email to the Office of Technology Transfer administrator or the Inventor requesting more information before processing a registration request.

Institution Not Retain Rights Email

When an organization or invention changes the patent status from "Institution Retains Rights" to some other value, an Email message is sent automatically to the primary and supporting agencies identified in the invention report related to the patent that rights are not being retained and that government action is needed.

Invention Disclosure Modified Email

When an organization modifies the text of an Invention Disclosure (Invention Disclosure Text data element) or uploads a new invention disclosure document, an Email message is sent automatically to notify the primary agency and the supporting agencies identified in the invention report that a new invention disclosure document has been uploaded and needs to be verified.

Invention Transferred to New Organization Email

When a user has transferred an invention disclosure, the Invention Transferred to New Organization Email is automatically generated and sent to the Extramural OTT Administrators who are assigned to the organization from whom rights are being removed and assigned to the organization receiving the rights to the invention disclosure being transferred. The email is also sent to the email address specified for the NIH User Support.

Inventor Waiver Request Email

The Inventor Waiver Request Email is generated automatically after successful completion of the commercialization form to notify the National Institutes of Health that an organization has requested approval for an inventor waiver for one of their inventions. The organization must still print, sign and fax the Inventor Certification form to complete the transaction.

Manufacturing Waiver Request Email

When an organization asks for approval for a manufacturing waiver for a patent filing, an Email message is sent automatically to the NIH.

Modify Account Email

When account information has been modified, an Email message with the changes is automatically sent to the account owner.

Not Elect Title Email

When an organization or inventor chooses not to elect title to an invention, an Email message is generated by the system to notify the primary agency associated with the invention that an invention report has been submitted with a status of "Not Elect Title".

Password Changed Email	When an account administrator resets a user's password, an Email message is automatically sent to the user with the new password. This randomly generated password must be changed the first time the user logs in.
Patent Confirmatory License Modified Email	When an organization or inventor uploads a new confirmatory license document, an Email message is automatically sent to the primary agency identified in the invention report related to this patent report indicating that a new Confirmatory License document has been uploaded and needs to be verified.
Patent Filing Modified Email	When an organization or inventor uploads a new patent filing document, an Email message is automatically sent to the primary agency identified in the invention report related to this patent report indicating that a new issued patent or patent application document has been uploaded and the government support clause needs to be verified.
Patent Link Broken Notification Email	When an organization or inventor modifies a patent link that causes a parent/child patent or invention relationship to be broken, an Email message is sent automatically to all organizations that had been able to view any related patent report.
Patent Transferred to New Organization Email	When an organization transfers an invention to another organization, an Email message is sent automatically to the organization relinquishing the rights and the organization receiving the rights, as well as to the iEdison Administration Office.
Reassign Disclosures Email	When an Office of Technology Transfer administrator assigns an Invention Report to someone other than the person who entered the report (the default owner), an Email message with details of the newly assigned Invention Report is sent to the new owner.
Registration Notification Approval Email	When a registration request is approved, a notification message is sent by Email to the Federal agency whose funding-agreement number was listed in the registration request form.
Registration Notification Email	When an organization registers with iEdison, the Federal agency whose funding agreement number is on the registration form is notified by Email, and the agency is asked to validate the organization's registration information.

Rejection Email	When the iEdison Accounts Administrator rejects a registration request, an Email message is sent automatically to the Office of Technology Transfer administrator or the Inventor who submitted the request.
Signatory Copy Approval Email	An Email message is sent automatically to the signing authority for an organization that the organization's request for registration has been approved, and the organization was registered with iEdison under their signing authority. The Email message goes to the person whose name and Email address was listed on the registration request as the signatory for the organization.
Third Party Assignment Request Email	When an organization requests approval for third party assignment for one of its inventions, an Email message containing the specifics of the request is sent to the NIH Accounts Administrator.
Verification Completed Notification Email	When the Office of Technology Transfer administrator or the Inventor verifies his or her Email address, the system replies to them with a message confirming that validation.

Administrator Enhancements

Update Organization Information	
Grantee/Contractor Organization	DAN'S INSTITUTION
Grantee/Contractor Organization Code	7654321
* Phone	717-555-1212
Phone Ext.	
Fax	
* Address	Turner Consulting Group
Address Line 2	2830 Calvert St., NW
Address Line 3	
Address Line 4	
* City	Washington
State	DC
Zip	20008
* Country	United States
Organization Type	NULL
* Are batch uploads allowed by this organization?	No
* Are the inventions submitted by the organization assigned to the user?	<input type="radio"/> No <input checked="" type="radio"/> Yes
* Month that begins the utilization reporting period	September
Contact for Person on fax form	
Prefix (e.g. Dr., Ms., Rev.)	
* First Name	Dan
Middle Name	
* Last Name	Turner
Suffix (e.g. Jr., Nobel)	

Figure 16 – Modify Grantee/Contractor Organization Form – Updating Organization Profile

An administrator in an organization—typically in the Office of Technology Transfer—may now modify that organization's address and phone number, and update the option to assign inventions to the user who submitted them.

To update the organization profile –

1. From the main menu, select “View/Update Your Organization’s Profile” to display the Modify Grantee/Contractor Organization form
2. Select “Update Profile” (appears at the bottom of the Modify Grantee/Contractor Organization form) to edit information.

NOTE: From the Modify Grantee/Contractor Organization form you may also view account and organization usage metrics.

Managing Organization Accounts

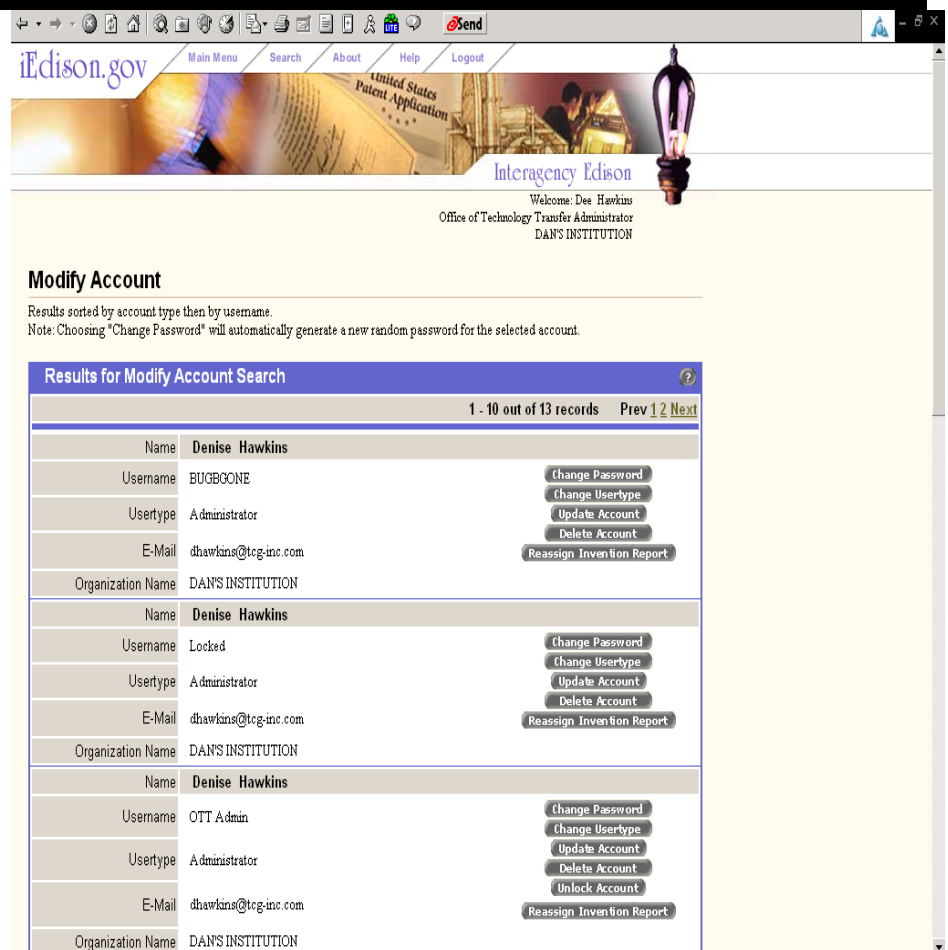


Figure 17 – Modify Accounts Search Results

Office of Technology Transfer Administrators may manage the accounts of the office's staff. Administrators can create, modify, and delete accounts; reassign inventions from one account to another, and unlock accounts. Each action produces an Email notification to the user informing him or her of those changes.

1. From the main menu, select "Search For An iEdison Account To Modify"
2. On the Modify Account search screen, enter and submit the account search criteria.
3. In the search results list, each account will be displayed with a button for each available action. Each action is described in greater detail on the following pages.

Change Password

Change Password

Change Password Confirmation

A new password has been generated for this account requiring the account owner to change their password the next time they log in. An email notification has been sent to the account owner to inform them of the change.

Figure 18 - Change Password Confirmation Page

Clicking the “Change Password” button on the Modify Account page will automatically generate a new password for the account you selected to modify. An Email message with the new password will be sent automatically to the account owner. That password must be changed the first time the user logs in.

Change User Type

Modify Account

All fields marked with an asterisk (*) are required. Fill out the fields below and then choose "Submit" to save your changes.

Change User Type for: user-ott

Current User type	User
New User type	Select One
	Select One Administrator User

Figure 19 - Change User Type Page

Clicking the “Change User Type” button on the Modify Account page allows the administrator to change the permission level for the account from user to administrator or administrator to user.

Update Account

Update Account Information

Username: user-ott

* Account type: OTT

* User type: User

* Change Password Date: 05/23/2003
Should the user be required to change their password the next time they login to the system? Please select Yes or No. [No]

Prefix: (e.g. Dr., Ms., Rev.)

* First Name: Ott

Middle Name or Initial:

* Last Name: User

Suffix: (e.g. Jr., Nobel)

Title:

Address:
[Address information not required, however, if you do supply one, all fields with a * are required]

* Address: AddressLine 2: AddressLine 3: AddressLine 4:

* City: * State: Select One * Zip: * Country: Select One

* E-mail: maureen@tcg-inc.com

Phone: ext. Fax:

Submit Cancel

Figure 20 - Update Account Information Page

Clicking the “Update Account” button on the Modify Account Page displays the update account information page, which allows the administrator to update the user’s contact information. An Email message with the changes is automatically sent to the user. (The user also has access to the contact information so that he or she may update it.)

Delete Account

Modify Account

Delete Account Verification

Are you sure you want to delete the account for OTTDenise? Note: If you delete an account you cannot reverse that action. You must create a new user account for that user.

Yes No

Figure 21 - Delete Account Verification Prompt

Delete Account prompts you to verify that you want to remove the account from the system. Deleting an account cannot be reversed.

Unlock Account

Verify Unlock Account



Unlock Account

Are you sure you want to unlock account for OTT Admin?

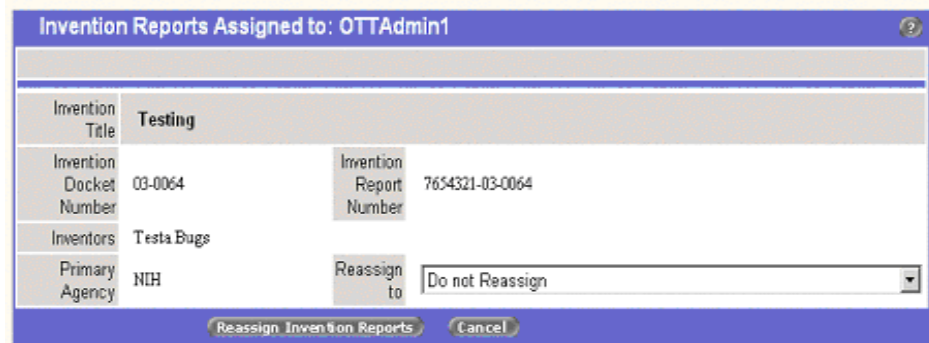
Figure 22 - Unlock Account Verification Prompt

Similar to deletion, unlocking an account prompts you for verification prior to actually unlocking the account.

Reassigning Invention Reports

Reassign Invention Reports

Results sorted alphabetically by title. Reassign one or more inventions and then choose "Submit" to save changes.



Invention Reports Assigned to: OTTAdmin1

Invention Title	Invention Docket Number	Invention Report Number	Inventors	Primary Agency
Testing	03-0064	7654321-03-0064	Testa Bugs	NIH

Reassign to:

Figure 23 - Reassigning Invention Reports Page

Invention Reports may now be reassigned from one user to another within the same organization. This feature was added to assist organizations with managing workflow and notification messages. By default, the original assigned user is the user who submitted the invention report. To reassign the report to a different user –

1. Clicking the “Reassign Invention Report” button on the Modify Account page produces a list of all reports assigned to that user. If there are no reports assigned to the user, an appropriate message will be displayed.
2. Locate the report you would like to reassign and select the user to which the report should be assigned from the “Reassign to” list box.
3. Click “Reassign Invention Reports”

Generate Invention Assignment Report

Current Assignments				
1 - 10 out of 64 records Prev 1 2 3 4 5 6 7 Next				
Invention Title	AAAA AAAAA	Invention Report Number	7654321-01-0008	Invention Docket Number 12-997 Name of Person Invention Assigned To Admin, Turner
Invention Title	Iaigh	Invention Report Number	7654321-03-0018	Invention Docket Number 03-0018 Name of Person Invention Assigned To Admin, Turner
Invention Title	JAB JAB JAB	Invention Report Number	7654321-02-0026	Invention Docket Number 678678678 Name of Person Invention Assigned To Blankenship, Jen
Invention Title	JAB JAB JAB 2	Invention Report Number	7654321-03-0019	Invention Docket Number 03-0019 Name of Person Invention Assigned To Blankenship, Jen
Invention Title	Barred test	Invention Report Number	7654321-02-0027	Invention Docket Number 02-0027 Name of Person Invention Assigned To Desrosier, Mark
Invention Title	Test Reasearchagreement date	Invention Report Number	7654321-02-0028	Invention Docket Number 02-0028 Name of Person Invention Assigned To Desrosier, Mark

Figure 24 - Invention Assignment Report

The Office of Technology Transfer Administrator can generate a new report that displays a list of all current assignments. To access the Invention Assignment report–

1. From the main menu, click “View or Download Reports on iEdison Records”.
2. Select the “Generate Invention Assignment Report Link”.

Clicking the highlighted text for the Invention Report Number displays the “Modify Invention Report” page.

Clicking the highlighted text for the name of the person the report is assigned to displays the “Modify Account” page.

NIH Administrator Enhancements

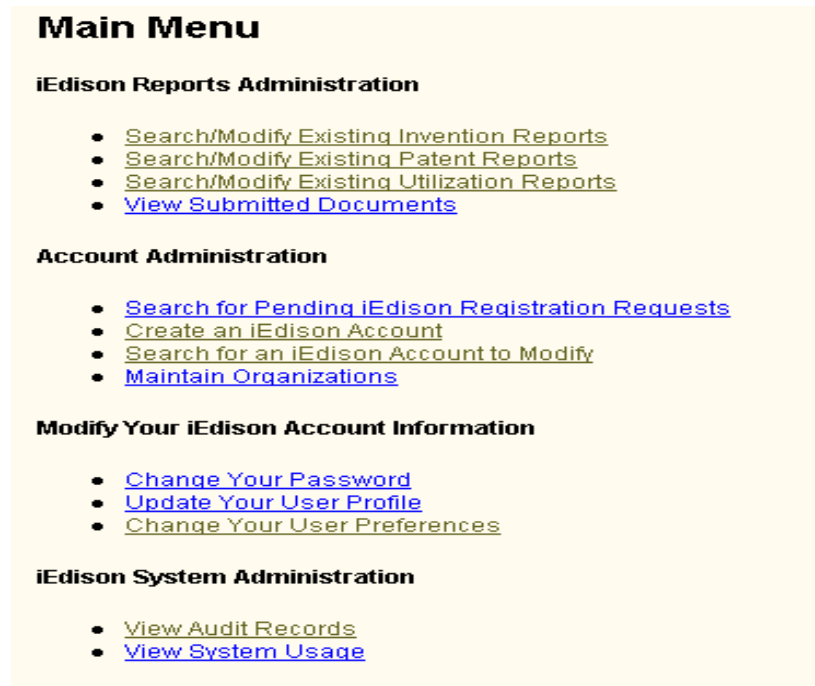


Figure 25 - NIH Administrator Main Menu

IEdison II gives NIH Administrators increased web based functionality that was previously only available via PowerBuilder or not at all. NIH Administrators can now -

- Search/view/modify invention-related data for **all** records in the system.
- View all documents submitted via the iEdison website without having to modify the invention or patent record.
- Process pending registration requests
- Manage **all** iEdison accounts including the ability to change the account type.
- Manage invention-related data by organization
- View audit records
- View system usage

This functionality will be explored in greater detail on the following pages.

Reports Administration

Although all users can search, view and modify invention records for the organization to which they belong or have been granted “view only” access, only the NIH Administrator can access all of the invention records in the system.

Figure 26 - Invention Report Search Page

To search for an Invention, Patent or Utilization report -

1. Click the link that relates to the type of report for which you are searching to produce the search criteria page for the report.
2. Enter and submit search criteria.

Modifications can be made to any report including uploading documents as described in the Electronic Submission of Invention and Patent Documents sections.

Figure 27 - Invention Report Search Results - Manage Utilization Reports

The same search page will be displayed when searching for Invention Reports as when searching for Utilization Reports. To add, view or modify a Utilization Report, click the “Manage Utilization Reports” button next to the related invention report on the search results page.

Viewing Documents

Invention Title: Testing new IDR auditing							
Invention Report Document Type:	Invention Disclosure	Invention Report Number:	7654321-03-0026	Invention Docket Number:	03-0026-01	Patent Docket Number:	03-0026-01-01
Grantee/Contractor Organization:	DAN'S INSTITUTION	Org Code for Other Orgs Allowed to View		Primary Agency:	NIH	Supporting Agency:	NIH
						Grant/Contract Number:	AA12345
Invention Title: Testing new IDR auditing							
Invention Report Document Type:	Invention Disclosure	Invention Report Number:	7654321-03-0026	Invention Docket Number:	03-0026-01	Patent Docket Number:	03-0026-01-02
Grantee/Contractor Organization:	DAN'S INSTITUTION	Org Code for Other Orgs Allowed to View		Primary Agency:	NIH	Supporting Agency:	NIH
						Grant/Contract Number:	AA12345
Invention Title: Testing new IDR auditing							
Invention Report Document Type:	Invention Disclosure	Invention Report Number:	7654321-03-0026	Invention Docket Number:	03-0026-01	Patent Docket Number:	03-0026-01-03
Grantee/Contractor Organization:	DAN'S INSTITUTION	Org Code for Other Orgs Allowed to View		Primary Agency:	NIH	Supporting Agency:	NIH
						Grant/Contract Number:	AA12345
Invention Title: Testing new IDR auditing							
Invention Report Document Type:	Invention Disclosure	Invention Report Number:	7654321-03-0026	Invention Docket Number:	03-0026-01	Patent Docket Number:	03-0026-01-04
Grantee/Contractor Organization:	DAN'S INSTITUTION	Org Code for Other Orgs Allowed to View		Primary Agency:	NIH	Supporting Agency:	NIH
						Grant/Contract Number:	AA12345

Figure 28 - View Documents Search Results Page

The NIH Administrator can view all Invention Disclosures, Confirmatory Licenses and Government Support Clause documents submitted via the iEdison Website.

To view documents –

1. Select “View Submitted Documents” from the Main Menu
2. Enter and submit search criteria.
3. Click the highlighted text next to the related Invention Report to display the document.

NOTE: Documents received via fax or mail will not be accessible.

Processing Registration Requests

Registration Status	<input checked="" type="radio"/> Pending <input type="radio"/> Approved <input type="radio"/> Rejected	Verified By Agency	<input type="radio"/> Yes <input checked="" type="radio"/> No
Faxed Registration Received	<input type="radio"/> Yes <input checked="" type="radio"/> No	Email Verified	<input type="radio"/> Yes <input checked="" type="radio"/> No
		Request Date & Time	03/20/2003 10:19 pm
Submit Changes Cancel Changes Send e-mail for more information			

Grantee/Contractor Organization Information	
*Grantee/Contractor Organization Name	ABC
* Organization Type	Small Business <input type="button" value="If 'Other,' describe:"/>
* OTT Address	12 Elm St
OTT Address Line 2	
OTT Address Line 3	
OTT Address Line 4	
* City	Pittsburgh
* State	GA
* Zip	10001
* Country	United States
* OTT Phone	555-555-4321 ext.
OTT Fax	
* Grantee/Contractor Organization Code	1234567

Figure 29 - Registration Request Details Page

iEdison II simplifies the registration process for new organizations and inventors. This is a web-based feature that is not available via PowerBuilder.

To process a registration request –

1. From the main menu, select “Search for Pending Registration Requests” to display the Registration Request Search Options Page.
2. Enter and submit search criteria.
3. From the Registration Requests search results; click the “View/Edit Registration Request” button next to the request you would like to view to display the Registration Request Details.

From the Registration Request Details page, the NIH Administrator can update the registration status, send an email request for additional information, note the receipt of registration verification items such as the faxed request, update organization information and assign a Grantee/Contractor Organization Code.

NOTE: Once the registration request has been approved all future updates to the organization information should be made via the Modify Account menu options.

Maintain Organizations

Grantee/Contractor Organization Maintenance

Results sorted alphabetically by organization name.

Choose "View Invention Reports" to view all the invention reports associated with the selected organization.

Choose "View Patent Filings" to view all the patent filings associated with the selected organization.

Choose "Return to main menu" to display the iEdison main menu or "Return to Search Screen" to perform a new search.

[Return to main menu](#)

[Return to Search Screen](#)

Organization Search Results	
1 - 10 out of 10 records Prev 1 Next	
Extramural Inventors Inc. - 9292929	
Grantee/Contractor 9292929 Organization Code	View Invention Reports
Organization Type Individual	View Patent Filings
Other Type Text	Manage Utilization Reports
Federal Agency NIH	
Extramural Inventors Ltd. - 3030303	
Grantee/Contractor 3030303 Organization Code	View Invention Reports
Organization Type Individual	View Patent Filings
Other Type Text	Manage Utilization Reports
Federal Agency NIH	

Figure 30 - Grantee/Contractor Organization Maintenance Search Results Page

Via the web, NIH Administrators have the ability to access all records related to the registered organizations. To access Organization records -

1. From the main menu, select "Maintain Organizations"
2. Enter and submit Search Criteria
3. From the search results, you can choose to view the Invention Reports, Patent Filings or Utilization Reports associated with a particular organization.

Clicking the applicable button will produce the search results for all records of the selected type associated with that organization and will allow access to view, modify or edit each record.

View Audit Records

Audit Record Search

Fill in any or all of these fields. Your search will encompass all audit records that meet the search criteria entered.

Search for Audit Records

Username

Event

Start Date (mm/dd/yyyy)

End Date (mm/dd/yyyy)

Order By ☒ Asc ☐ Desc

Results Per Page

Figure 31 - Audit Record Search Form

The audit trail in the new iEdison system enables NIH administrators to monitor system usage and data changes. To access the audit trail –

1. From the Main Menu, select View Audit Records to display the audit record search page.
2. Enter and submit search criteria.

Audit Record Search

Results sorted by event date. Select the event for which you would like to view event details.

Search Results

Audit Event	User	Entity	Session ID	Event Date	Comment
AccountCreate	togadmin	georgestonel	02389b561998	2003-03-06 10:53:00.0	Admin name: togadmin
AccountCreate	togadmin	extramuraladmin	02389b561998	2003-03-06 10:55:00.0	Admin name: togadmin
AccountCreate	togadmin	extramural	64019f17ce1	2003-03-06 10:56:00.0	Admin name: togadmin
AccountCreate	mms-ott-admin1	mms-ott-user1	64019f17ce1	2003-03-06 10:58:00.0	Admin name: mms-ott-admin1
AccountCreate	togadmin	billnelson30	64019f17ce1	2003-03-06 10:58:00.0	Admin name: togadmin
AccountCreate	togadmin	lizanelson30	64019f17ce1	2003-03-06 10:59:00.0	Admin name: togadmin
AccountCreate	mms-ott-admin1	mms-ott-user2	64019f17ce1	2003-03-06 10:59:00.0	Admin name: mms-ott-admin1
AccountCreate	togadmin	tschwenk	8fb572631e7b	2003-03-06 11:26:00.0	Admin name: togadmin
AccountCreate	lizanelson30	hollyberry	85c902d15375	2003-03-06 13:41:00.0	Admin name: lizanelson30
AccountCreate	admin2	tracia	ae77b747c5af	2003-03-06 23:13:00.0	Admin name: admin2

1 - 10 out of 292 records Prev [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#) [13](#) [14](#) [15](#) [16](#) [17](#) [18](#) [19](#) [20](#) [21](#) [22](#) [23](#) [24](#) [25](#) [26](#) [27](#) [28](#) [29](#) [30](#) Next All

Figure 32 - Audit Record Search Results

The search results will display the user actions, username, entity affected, session identifier, event date, and any applicable comments. The columns may be changed to display in ascending or descending order by clicking on the blue arrows located next to each column heading.

Audit Record Search		
Details of the selected audit event are displayed below.		
Audit Record Details		
Item	Old Value	New Value
E-Mail		dhawkins@teg-inc.com
Username		OTTAAdmin1
Last Name		Hawkins
Account type		5
Mesg login		No
User type		1
NIH Institute or Center		3
First Name		Dee
Return to Search Screen		

Figure 33 - Audit Record Details

Clicking the link for the event will display the record details, including the old and new data values for each field that was affected by the users actions.

View System Usage

View System Usage			
Organization Usage Totals			
Total Extramural Organizations	18	Total Federal Agencies	19
Total Extramural Accounts	1194	Total Federal Accounts	883
Total Extramural Logins	1504	Total Federal Logins	1672
Return			

Figure 34 - Organization Usage Totals Page

To view the organization usage totals for the system –

1. From the main menu, select “View Organization Usage” to display the Organization Usage Totals Page.

From these figures, the NIH administrator can determine the total number of registered extramural organizations and federal agencies, total number of extramural and federal accounts and the total number of extramural and federal logins.